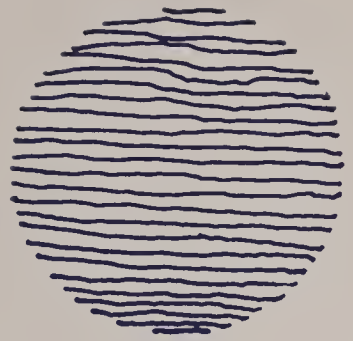


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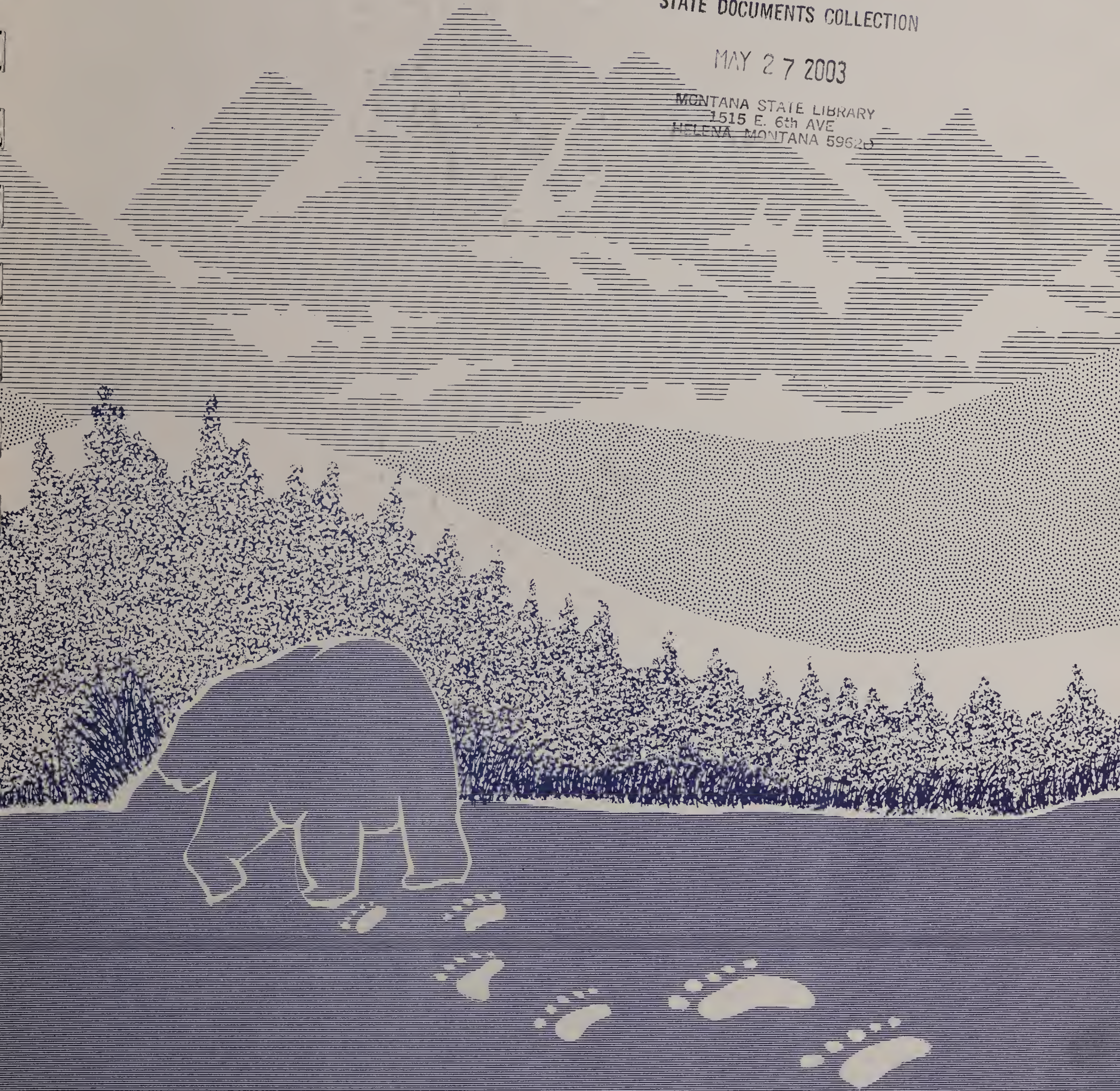
EXECUTIVE SUMMARY



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The following Executive Summary provides an overview of the report Trail of the Great Bear Study. The report provides information on the Trail of the Great Bear Concept, which proposes to establish an international scenic touring corridor that links the world's first national park, Yellowstone, to the world's first international peace park, Waterton-Glacier, to Canada's first national park, Banff.

It should be noted that the study was conducted by an independent consultant, and was funded through the Canada/Alberta Tourism Agreement and the State of Montana. As such, this study does not represent the policies of the respective governments, nor does it imply any commitment to implementation. It is anticipated that implementation will be co-ordinated and lead by the Trail of the Great Bear Tourist Society.

If you have any comments relative to the report, please forward them to either:

Regional Planning Unit
Planning Division
Alberta Tourism
5th Floor CityCentre
10155 - 102 Street
Edmonton, Alberta
T5J 4L6
Telephone: (403) 427-2501

Travel Montana
Department of Commerce
1424 - 9th Avenue
Helena, Montana
59620
Telephone: (406) 444-2654

Comments concerning implementation activities should be forwarded to the Trail of the Great Bear Society, c/o Ms. Beth Russell, Box 142, Waterton, Alberta Canada, T0K 2M0, telephone - (403) 859-2663.

Additional copies of this report are available by contacting the Society.

Sincerely,

Bernard F. Campbell
Deputy Minister
Alberta Tourism

Sandra Guedes
Director of Tourism
Travel Montana

TRAIL OF THE GREAT BEAR

EXECUTIVE SUMMARY

Prepared for:

Alberta Tourism
Travel Montana

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November, 1990





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TRAIL OF THE GREAT BEAR

EXECUTIVE SUMMARY

1.0 Introduction

As the world's interest in preserving and maintaining environmental, cultural and social values grows, tourism concepts which conserve these resources, such as ecotourism or "green" tourism, are receiving increased attention as viable economic alternatives. In support of this interest, Alberta Tourism and Travel Montana commissioned the Calgary firm of Pannell Kerr Forster in 1989 to undertake an assessment of the potential for a tourism product originally identified by the Trail of the Great Bear Society, which could fulfil this role.

This tourism concept involves the establishment of an international scenic corridor which would span Alberta and Montana. It would perpetuate and commemorate cultural, wildland and national park values and further an appreciation and understanding of them, through promotion of appropriate recreation and tourism uses. The proposed corridor would link the world's first national park, Yellowstone, to the world's first international peace park, Waterton/Glacier to Canada's first national park, Banff. The name selected to represent the vast region it would traverse was the Trail of the Great Bear.

2.0 The Trail of the Great Bear

The Trail of the Great Bear spans 2,085 miles or 3,350 kilometres in two countries. It consists of a system of roads which traverses an international border and links four significant national parks: Yellowstone and Glacier in the United States, and Waterton and Banff in Canada.

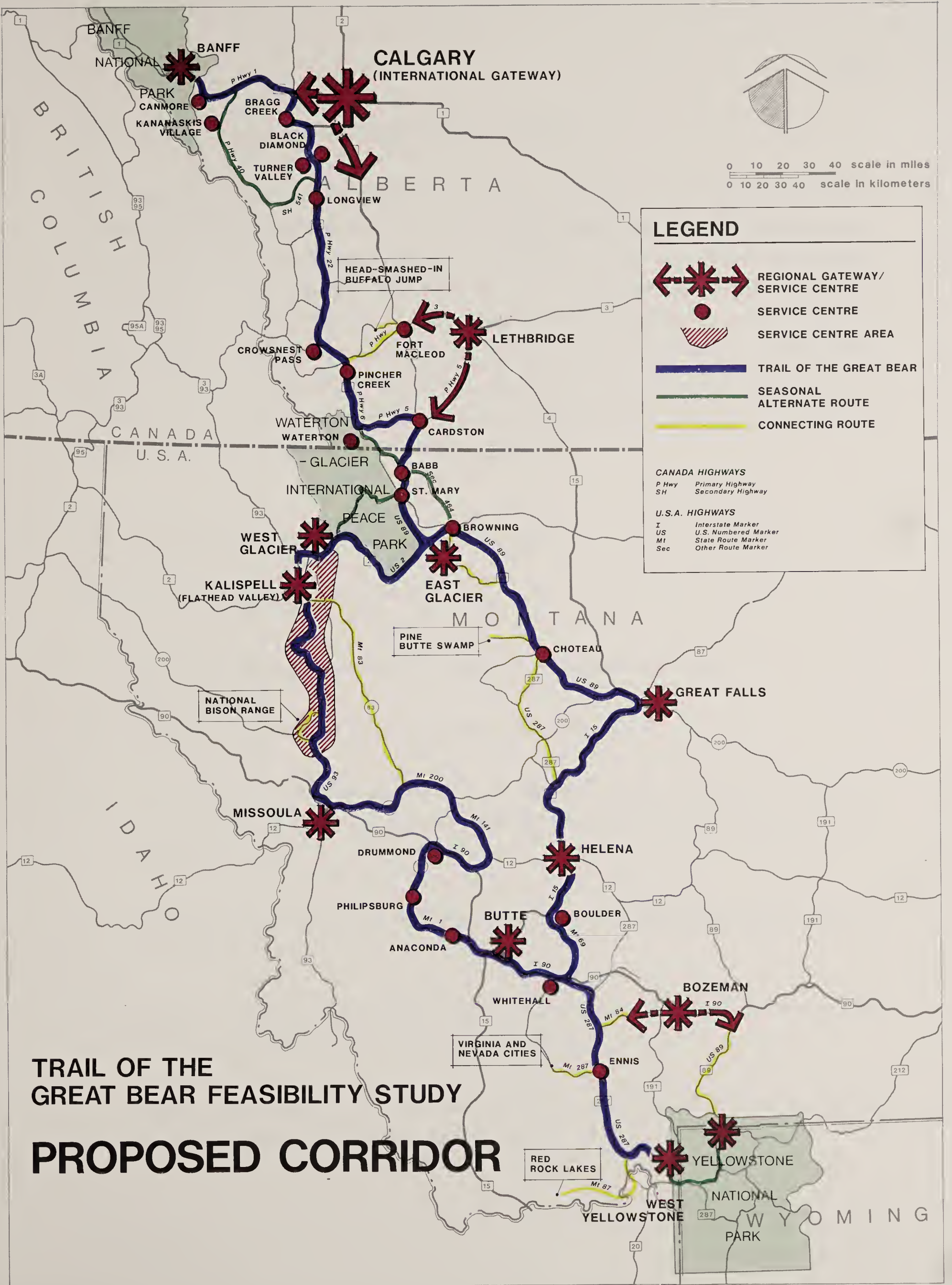
In addition to the significant resources found in the four national parks, the corridor offers an exceptional variety of natural, cultural/historic and tourism resources along the Trail of the Great Bear. These resources, outside of the parks, have only recently begun to be identified and considered for promotion in national and international markets. Many of the resources

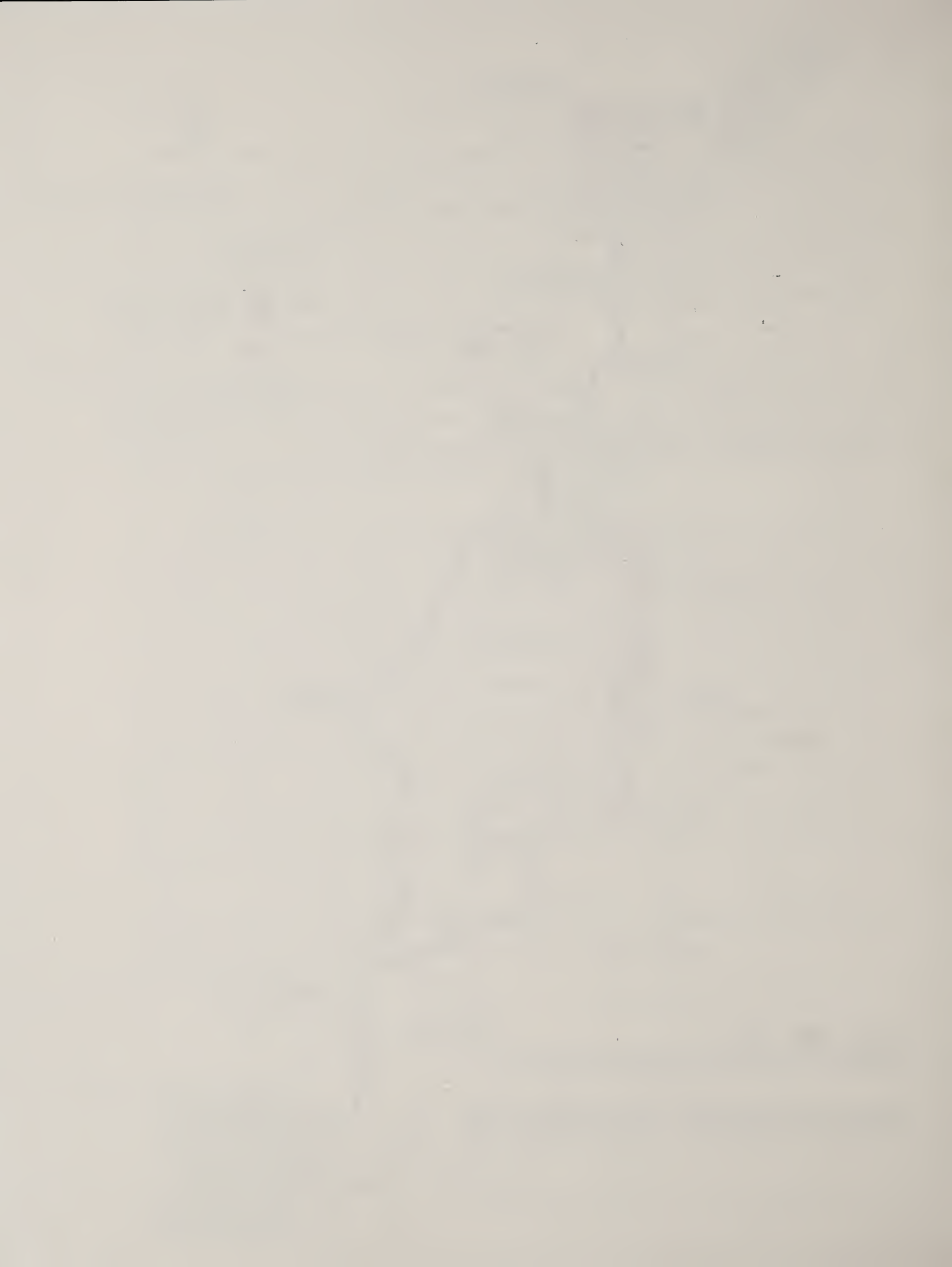
have the potential to draw visitors from the national parks or divert them from parks which are currently overcrowded at various periods of the year. While easing the pressure on the parks, the Trail will assist in further distributing the economic impact of that visitation to a broader region along the Trail. Many sections of the Trail lend themselves to four season travel and provide winter attractions. Major themes exist which make the Trail of the Great Bear unique in the world. These themes include: wildlands and wildlife, major ecosystems, native, historic, cultural and settlement themes.

In many parts of the world, where preserved wildlands exist in the condition of those found along the Trail, they are difficult to access, and where they are easily accessible, they have not been preserved. In this regard, the Trail of the Great Bear is unique, offering both pristine wildland and accessibility to protected areas.

The proposed Trail of the Great Bear Corridor is shown on the following map. The Trail includes connecting routes which permit the Trail to be connected to major gateways, and/or to attractions of particular interest. Seasonal alternate routes have been identified which enhances the Trail during the summer season or compensates for roads which are closed in the winter. Gateways to the Trail of the Great Bear from major sources of markets are strategically located throughout its length. Gateways are an important part of a tour system and are areas with a concentration of significant visitor services which may include major airports or transportation facilities. Gateways are major access and transition points within and into the corridor. In addition, the Trail of the Great Bear is well provided with service centres. These are defined as areas where some or all visitor amenities such as food service facilities, gasoline and car service and accommodation may be available, so that travellers are never more than a one hour drive from services.

The selected roads are in satisfactory condition and with the completion of current paving programs in Alberta, the entire Trail will be located on paved highway.





3.0 Trail of the Great Bear: Philosophy and Concept

The philosophy of the Trail of the Great Bear is to commemorate and perpetuate cultural, wildland and national park values and to further an appreciation and an understanding of these values through promotion of appropriate recreation and tourism uses associated with them. The concept of the Trail of the Great Bear is to link Yellowstone, the world's first national park through the world's first international peace park, Waterton/Glacier, to Canada's first national park, Banff. The concept encourages recreation and tourism uses, and developments and services that are compatible with, and promote a greater understanding of existing natural, historical and cultural resources and values, while recognizing that a healthy and economically viable tourism industry is essential to support these aims.

4.0 Trail of the Great Bear: Goals and Objectives

The goals of the Trail of the Great Bear are to:

- promote and perpetuate cultural, wildland and national park values;
- further an appreciation and understanding of these values;
- encourage the development of an economically viable tourism industry that recognizes, encourages and supports a mutually beneficial relationship between resource integrity and tourism use;
- increase tourism benefits to the region through the implementation of the Trail of the Great Bear concept;
- increase economic impacts to the region through tourism developments and activities that reflect the Trail of the Great Bear philosophy;
- develop the Trail of the Great Bear route as an international corridor with a high quality recreation/vacation experience.

From these goals the following objectives have been derived:

- to develop a tourism corridor offering access, interpretation and education for wildlands, wildlife and historical and cultural attractions within its boundary;
- to design the corridor so that it links Banff National Park, Waterton/Glacier International Peace Park and Yellowstone National Park;
- to provide the opportunity for development of environmentally sensitive, sustainable tourism products, facilities and services congruent with the philosophy of the Trail of the Great Bear;
- to develop a concept that appeals to, and can be practically utilized by, broad market segments.

5.0 Achieving Goals and Objectives

Consideration must be given to various aspects in order to achieve the Trail of the Great Bear goals and objectives as an ecotourism concept.

To attract national and international tourism markets, the Trail of the Great Bear tourism destination product must fulfil the needs and perceptions of visitors. These needs include basic visitor amenities such as food and shelter as well as satisfying the reasons for choosing a destination which includes natural and man made attractions, recreation opportunities, cultural and historic educational experiences and opportunities for relaxation. In addition, it is paramount that the product be accessible to the market. The Trail of the Great Bear meets all of the aforementioned requirements while at the same time allowing opportunity for expansion and/or development. Some road infrastructure requirements, such as signing and pulloffs will be necessary. Loop tours will allow visitors with limited vacation time to experience the Trail, and will assist in redistributing visitation from highly used areas to less crowded areas.

Also of importance is the support and adherence to the philosophy of the Trail of the Great Bear. In this regard a process must be established for addressing environmental concerns

with local communities, environmental groups and agencies so that potential problems are identified and resolutions made before they become issues.

By providing a networking and implementation system for agencies, associations and individuals charged or concerned with environmental protection and sustainable use, the Trail of the Great Bear could serve as a model in ecotourism.

The Trail of the Great Bear is a long term project; some corridors have taken up to 50 years to reach their potential. The pace of development will depend on many future events and factors including: community involvement, marketing and promotion programs, and the level of acceptance and interest of the markets to the product.

While support in principle for the Trail of the Great Bear has been expressed by various government agencies, corporate stakeholders and private stakeholders, commitment by any individual or agency regarding financial support for the project and its implementation has yet to be determined.

6.0 The Markets

Tables 6-1 and 6-2 present both the existing and potential market segments for the proposed corridor by geographic origin.

TABLE 6-1
EXISTING MARKET SEGMENTATION BY GEOGRAPHIC ORIGIN
FOR PROPOSED CORRIDOR IN RANK ORDER*

<u>Market Type</u>	<u>Alberta</u>	<u>Montana</u>
Primary	<ul style="list-style-type: none"> • Alberta • Montana • British Columbia • Saskatchewan 	<ul style="list-style-type: none"> • Montana • Alberta • Pacific Coast States • Mountain States • North Central State
Secondary	<ul style="list-style-type: none"> • Other Canada • Other United States 	<ul style="list-style-type: none"> • Other United States • Other Canada
Tertiary	<ul style="list-style-type: none"> • Japan • United Kingdom • Germany • Other Overseas 	<ul style="list-style-type: none"> • United Kingdom • Germany • Japan • Other Overseas

Source: Pannell Kerr Forster research

Note: Primary markets represent the strongest existing markets to the proposed corridor area and the province/state. Secondary and tertiary markets represent more long term markets to be developed for the corridor area.

* The existing market segments were rank ordered in terms of the current size of the market visiting Alberta and Montana.

TABLE 6-2

**POTENTIAL MARKET SEGMENTATION BY GEOGRAPHIC ORIGIN
FOR PROPOSED CORRIDOR IN RANK ORDER***

<u>Market Type</u>	<u>Alberta</u>	<u>Montana</u>
Primary	<ul style="list-style-type: none"> • Montana • British Columbia • Saskatchewan 	<ul style="list-style-type: none"> • Alberta • Pacific Coast States • Mountain States • North Central States
Secondary	<ul style="list-style-type: none"> • Germany • Japan • United Kingdom 	<ul style="list-style-type: none"> • Germany • United Kingdom • Japan
Tertiary	<ul style="list-style-type: none"> • Other Canada • Other United States • Other Overseas 	<ul style="list-style-type: none"> • Other United States • Other Canada • Other Overseas

Source: Pannell Kerr Forster research

Note: The identification of potential market segments has concentrated on the non-resident markets since they will generate new revenues into the province/state. The selection of these target markets takes the long term growth of this project into consideration.

* The potential market segments were evaluated based on a number of criteria including length of stay, expenditures, origin, size of the market, seasonality, trip purpose and mode of transport.

It is recognized that resident travel markets will be especially important to the proposed concept to stop tourism revenue leakages from outside of the province/state, and for the initial/short term marketing of the concept. Increased cross border visitation between the province and state should also occur. Over the long term the overseas markets, and more specifically those seeking "culture and nature" as a travel motivator, should be targeted.

While segmentation by geographic origin provides some insight into the characteristics of potential markets, a division of markets by their actual trip purpose and/or mode of transport enhances the understanding of the Trail of the Great Bear traveller. The most viable potential markets are presented in Table 6-3.

TABLE 6-3
MARKET SEGMENTATION BY TRIP PURPOSE/
MODE OF TRANSPORT

<u>Trip Purpose</u>	<u>Mode of Transport</u>
1) National Parks	1) Private Automobile
2) Special Interest Groups	2) Recreational Vehicle-owner
3) Attractions/Special Events	3) Fly and Drive
4) Visiting Friends and Relatives	4) Recreational Vehicle-rental
5) Short Getaway	5) Motor Coach Tours
6) Group Touring	

Source: Pannell Kerr Forster research

The table reveals that national park visitors and special interest groups offer strong potential for the Trail given their strong focus on natural features. The private automobile touring market represents a large and distinct group of travellers; a proportion of whom could experience their holiday along the Trail.

In terms of visitation projections, the proposed concept would draw from two sources: existing visitors to Alberta and Montana and new visitors to the corridor area. The incremental visitations were analyzed separately for the Alberta and Montana portions of the route and resulted in these visitation figures:

1)	Potential (long term) incremental visitation to Alberta	879,850
2)	Potential (long term) incremental visitation to Montana	598,380
		<hr/>
	Total Annual Incremental Visitations	1,478,230
		<hr/> <hr/>

The potential new visitations for the entire route were estimated separately for North America and for the overseas markets and resulted in these visitation figures:

1)	Potential new visitations (long term) from North America	233,851
2)	Potential new visitations (long term) from overseas	29,500
	Total Annual Potential New Visitations	<u>263,351</u>

These projected visitation figures were derived from existing visitation statistics to Alberta and Montana, the population base of various regions, the potential market travel segment from overseas areas, and their respective estimated capture ratios.

7.0 Economic Impact

The potential economic impact estimation of the proposed Trail of the Great Bear on Alberta and Montana used an economic impact model and approach. Highways are normally categorized as infrastructure, and not tourism generators. In the case of a scenic touring highway, however, the highway itself creates the access to the tourism opportunities, and becomes part of the tourism generator.

The economic impact on Alberta and Montana was assessed independently, using the same methodology. Some of the general assumptions made for the economic impact analysis include:

- Visitation estimates are based upon a fully developed Trail, which could take up to 50 years. While it is recognized that resident markets will assist in stopping tourism revenue leakages outside the province or state, this analysis is limited to **non-resident** markets since they will generate new revenues.
- All dollar figures are identified as 1990 Canadian or U.S. dollars.
- Capital and operating costs relate to signage, roadside pulloff construction and maintenance and are above those that currently exist. The proposed signing and

roadside pulloff construction costs should be considered as basic in scale and scope. The costs of road improvements and/or construction of access roads have not been considered in the analysis.

- The impact of recreational opportunities relate to the longer term growth of the region as a destination and cannot be accurately estimated at this time. As such, their impact has not been considered in this analysis.
- The route length assessment (one way) for Alberta is 770 kilometres (480 miles) and for Montana is 2,580 kilometres (1,605) miles.
- Private costs related to the construction and operation of tourism services and facilities have been termed as "induced private sector facilities". Private sector investment will be the result of demand for, and profitability of those services and facilities.

The projected economic impacts (based upon full development and a stabilized year) for Alberta and Montana are as follows:

1. The one-time capital cost impacts to Alberta are projected at \$0.48 million (Cdn.), for signing and pulloffs, and \$16.5 million (Cdn.) for induced private sector facilities. The capital costs for Montana are projected at \$0.78 million (U.S.) for signing and pulloffs, and \$21.1 million (U.S.) for induced private sector facilities. The capital costs for Montana will be higher due to a major portion (4/5^{ths}) of the Trail situated in the state.
2. Annual operating cost impacts for Alberta are projected at \$0.3 million (Cdn.) for highway maintenance and \$2.3 million (Cdn.) for induced private sector facilities. Annual operating cost impacts for Montana are projected at \$0.56 million (U.S.) for highway maintenance, and \$2.4 million (U.S.) for induced private sector facilities.
3. The projected incremental annual visitation (non-resident person day visits) is projected at 1,666,347 for Alberta and 1,207,645 for Montana.

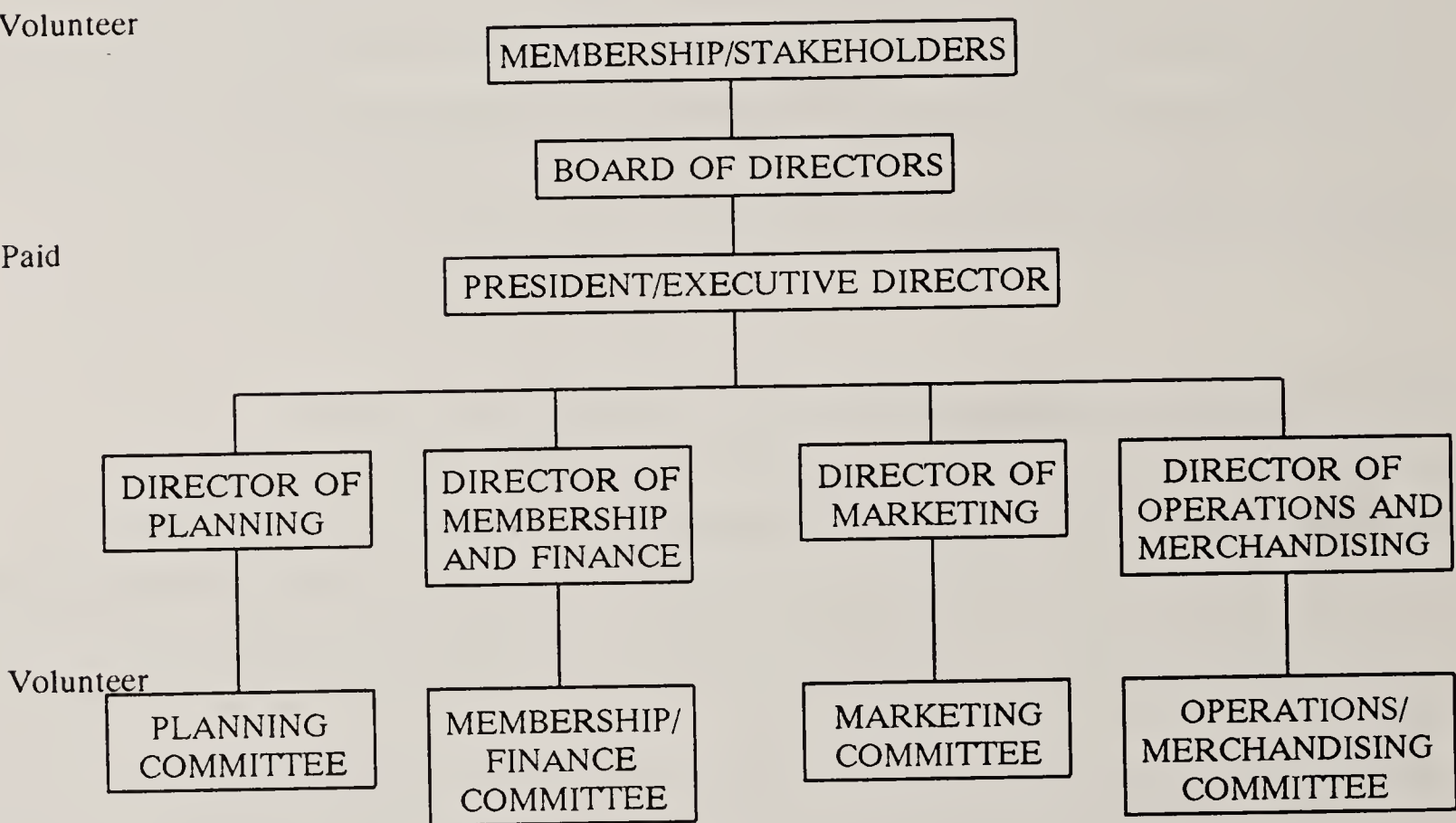
4. Estimated annual direct expenditures (by non-residents) for Alberta is \$51.9 million (Cdn.) and \$26.2 million (U.S.) for Montana.
5. The annual income impact on the region for Alberta is projected at \$86.5 million (Cdn.) and for Montana at \$58.5 million (U.S.).
6. The annual employment impact on the region (person years) is projected at 1,802 for Alberta and 1,359 for Montana.
7. The annual taxation impact for Alberta is projected at \$14.7 million (Cdn.) and for Montana at \$3.7 million (U.S.).

It is evident from the analysis that the Trail of the Great Bear will have a positive impact on Alberta and Montana. The future development of the Trail will result in an increased number of visitors, shifting of visitor use, growth in service sector facilities and opportunities, and substantial tourism expenditures.

8.0 Implementation Strategy

The implementation of the Trail of the Great Bear will require the coordinated efforts of a number of groups and individuals from the public and private sectors. Research of other scenic corridors has shown that a central organization is required to provide a solid foundation for coordinated growth and development and act as a centralized source for drafting and implementing action plans, as well as acting as a central organization to interface with the tourism and travel industry, and national and international marketing networks. A suggested organization chart for the administrative structure is presented in Table 8-1. The existing Trail of the Great Bear Society could evolve into this organization.

TABLE 8-1
TRAIL OF THE GREAT BEAR MASTER ORGANIZATION
ORGANIZATION CHART



Comparative research showed that volunteerism and community stakeholder involvement is a critical element in the success of a tour corridor. Volunteers are critical to ensure support and continuity by allowing participation from stakeholders throughout the entire length of the Trail. For example, loop tours will be identified and developed by the various communities along the route. More specifically the role of the volunteer committees would be to provide support to each director in terms of staffing, input and geographic representation. In turn, local committees could be established to follow through on the plans determined by the central committee.

One of the overriding objectives for the implementation strategy is the goal of financial self sufficiency for the Trail of the Great Bear organization. This could feasibly be attained through the implementation of its membership program, corporate sponsorship, sale of advertising revenues, the sale of Trail of the Great Bear logo and commercial items. A suggested action plan outlining the general implementation and development process of the proposed Trail of the Great Bear is presented in Table 8-2. It must be noted that while some tasks do have a definite time line, others would be ongoing throughout the life of the Trail of the Great Bear scenic corridor. Also due to the different jurisdictions, some aspects may see completion sooner than others.

TABLE 8-2
TRAIL OF THE GREAT BEAR
OVERALL IMPLEMENTATION/DEVELOPMENT ACTION STEPS

<u>ACTION STEPS</u>	<u>PERFORMED BY</u>	<u>TIMING (YEARS)</u>
Form master organization, protect Trail of the Great Bear name	Trail of the Great Bear Society	0 - 1
Appoint Board of Directors	Trail of the Great Bear Society	0 - 1
Appoint President/Executive Director	Board of Directors	0 - 1
Ratify philosophy, goals, objectives	Board of Directors and President/Executive Director	0 - 1
Initiate liaison with respective government bodies	Board of Directors	0 - 1
Identify and confirm sources of funding	Board of Directors	0 - 1 and On going
Organize and implement fundraising drive	President/Executive Director	0 - 1 and On going
Appoint Directors	Board of Directors	0 - 1
Establish developmental guidelines for the Trail, develop policies and set technical standards for Trail participants	Officers	0 - 1
Address concerns such as policies/bylaws identified that may impede the implementation of the Trail and identify policies/bylaws which enhance or support the Trail and work with the various agencies involved in their administration	Director of Planning	0 - 1
Establish membership guidelines, levels	Officers	0 - 1
Establish and implement membership sales program	Director of Membership and Finance	0 - 1
Implement membership drive and pursue members	Director of Finance and Membership and Membership/Finance Committee	0 - 1 and On going

Table 8-2 Continued

<u>ACTION STEPS</u>	<u>PERFORMED BY</u>	<u>TIMING (YEARS)</u>
Develop information package for distribution	Director of Marketing	1 - 3
Determine Trail management sections within the corridor	Officers	1 - 3
Establish committees to support the organization	Officers	1 - 3
Appoint representatives from management sections to committees	Director of Planning	1 - 3
Establish and implement a signing program (trailblazer, interpretive, and attractions)	Director of Operations and Merchandising and Operations/Merchandising Committee	1 - 3
Establish committees to identify loop tours	Director of Planning	1 - 3+
Design a corridor development plan addressing infrastructure needs, road improvements, site interpretation/restoration/development and environmental considerations	Director of Planning and Planning Committee	1 - 3
Initiate creation of commercial Trail publications, souvenirs, specialty items	Director of Operations and Merchandising and Operations/Merchandising Committee, Director of Membership and Finance and Membership/Finance Committee	1 - 3+
Implement corridor development plan	Director of Planning and Planning Committee and Director of Operations and Merchandising and Operations/Merchandising Committee	3 - 5+
Design and implement tourism monitoring system	Director of Operations and Merchandising and Operation/Merchandising Committee	3 - 5 On-going

9.0 Marketing Strategy

A comprehensive marketing strategy isolates market segments most likely to use the Trail of the Great Bear, and positions its marketing efforts to fulfil the needs of the selected markets. This concept has been positioned as an international scenic touring corridor that uses the grizzly bear as a logo symbol of the region's unique wilderness heritage. Key features of the Trail that should be emphasized are as follows:

- The international component of the Trail;
- The variety of accessible flora and fauna along the Trail; and
- The variety and preserved status of unique natural, cultural and historic resources enroute.

As a new product, further market testing of the name and concept will be required. Demand will need to be stimulated for the Trail by targeting specific markets with key marketing themes that convey the impression of what the visitor can expect to find along the route. Table 9-1 outlines the major marketing themes, target markets and product examples with a seasonal component for the Trail.

TABLE 9-1
MARKETING THEMES/PRODUCTS
TRAIL OF THE GREAT BEAR

Marketing Themes	Target Markets	Product Examples	Seasonality
1. National Parks	<ul style="list-style-type: none"> • National Parks visitors • Special interest groups • Overseas markets (Japan, Germany, U.K.) • Fly and Drive 	<ul style="list-style-type: none"> • Mountains, scenery, wildlife, forests, nature • Banff/Waterton - Glacier/Yellowstone National Parks 	Year-around
2. Native Culture	<ul style="list-style-type: none"> • Attractions/Special Events • Group touring • Overseas markets • VFR/short getaway • Fly and Drive 	<ul style="list-style-type: none"> • Chief Mountain, Head-Smashed-In Buffalo Jump, Blackfoot and Peigan Reserves, Plains Indian Museum 	Year-around
3. Non-native Culture	<ul style="list-style-type: none"> • Attractions/Special Events • Group touring • Overseas markets (United Kingdom, Japan) • VFR/short getaway • Fly and Drive 	<ul style="list-style-type: none"> • Montana State Historical Society, Lewis and Clark Centre, Museum of the Rockies, C.M. Russell Museum, Frank Slide Interpretive Centre 	Seasonal (May 1 - September 1) some year-around
4. Historic Sites	<ul style="list-style-type: none"> • Attractions/special events • VFR/short getaway • Group touring • Fly and Drive 	<ul style="list-style-type: none"> • Bozeman Trail, Anaconda, • Grant-Kohrs National Historic Site, Fort Whoop-Up, Fort Macleod, Crowsnest Pass, and several interpretive centres 	Seasonal (May 1 - September 1), some year-around

Table 9-1 Continued

Marketing Themes	Target Markets	Product Examples	Seasonality
5.* Soft Adventure Tourism/Recreation	<ul style="list-style-type: none"> • Fly and Drive • Special interest groups • Pacific Northwest • British Columbia, Alberta, Montana 	<ul style="list-style-type: none"> • Skiing, snowmobiling, canoeing, white-water rafting, horseback riding 	Seasonal (i.e. winter - skiing; spring/summer - canoeing)
6. Wildlife	<ul style="list-style-type: none"> • Ecotourism groups • National parks visitors • Overseas markets (Germany) • Fly and Drive 	<ul style="list-style-type: none"> • Trout streams, large mammals • Habitats • Birds 	Seasonal (Spring/Fall especially good viewing times)
7. Nature Appreciation	<ul style="list-style-type: none"> • National parks visitors • Overseas markets (Germany) • Ecotourism groups • Fly and Drive 	<ul style="list-style-type: none"> • Flora, Fauna, rock formations (i.e. Columbia Rockies) foothills, land forms 	Seasonal (Spring/Fall)

* Soft adventure refers to experiencing outdoor activities such as skiing, canoeing, hiking and horseback riding with the comforts of modern day amenities (i.e. luxury in the midst of the wilderness).

Four key marketing strategies were identified which should drive the marketing of the corridor region, with their respective marketing objectives and target markets.

Marketing Strategy #1

To position the Trail as an "ecotourism model" for a scenic corridor, that responds to sensitive environmental issues and sustainable tourism industry development concerns.

Marketing Objectives

- To increase awareness of the Trail's historical, cultural and natural resources.
- To identify and encourage protection of resources which are environmentally fragile and which contribute strongly to the Trail's landscape.

Target Markets

- National Parks visitors.
- Special interest groups (i.e., ecotourists).
- Private automobiles/fly and drive markets from national/overseas origins.

Marketing Strategy #2

To market the Trail as an international corridor that connects four world-class national parks, and acts as a gateway to wilderness tourism.

Marketing Objectives

- Establish tourism themes based on existing features.
- Increase recreational opportunities for visitors.
- Establish well defined interpretive materials and signage to inform visitors of the Trail.
- Increase international tourism to the corridor area.

Target Markets

- Overseas visitors (i.e., fly-drive, R.V. rental markets to Alberta/Montana with emphasis on Germany and the United Kingdom).
- Private automobiles/R.V. travellers to Alberta/Montana from other provinces/states.
- National park visitors to Banff, Waterton, Glacier, and Yellowstone.
- Special interest groups with focus on wilderness/ecotourism.

Marketing Strategy #3

To establish a marketing image for the Trail that emphasizes visitor enjoyment of the various resources, and supports educational opportunities along the route.

Marketing Objectives

- Increase recreational/educational opportunities for visitors.
- Establish well defined interpretive materials/centres to inform and educate visitors.
- Increase awareness of the Trail as a vacation destination opportunity.

Target Markets

- Mountain and Pacific Coast States, British Columbia and Saskatchewan residents - especially families with children.
- Overseas markets, focusing on Germany, Japan, and the United Kingdom.
- Group touring and V.F.R. markets.
- Private vehicle touring market.

Marketing Strategy #4

To market the Alberta/Montana regions that encompass the Trail as four season destination areas.

Marketing Objectives

- To increase spending by current and potential visitors to the corridor area.
- To increase tourism flow to the corridor area in the shoulder seasons (spring, fall, winter).
- To increase the length of stay of visitors to the region.
- To expand existing visitation along the corridor.
- To redistribute visitation from highly travelled tourism areas in the summer to less crowded loop tour destinations.

Target Markets

- Seniors market from urban geographic areas, especially recreational vehicle owners.
- Short getaway market for extended weekend vacations.
- Overseas markets, focusing on the fly and drive and tour group travellers from Germany, Japan and the United Kingdom.
- North American markets - fly and drive and tour group travellers.

10.0 Conclusion

The Trail of the Great Bear provides an opportunity for Alberta and Montana to become leaders in a unique tourism initiative that uses, but conserves the natural, historical and cultural resources that form its product base.

The implementation of this concept should be considered as a long term project. As stated earlier, some scenic tour highway concepts have taken up to 50 years to reach maturity. In addition, since the majority of visitors will not have time to visit the entire route in one trip, various segments or loop tours may be used instead. Some of these may develop faster than others, depending on their promotion, their accessibility, and the degree of support that is provided by local communities along the route. With good airports and gateways at key locations along its route, good existing paved roads throughout its length, visitor services which are strategically located, and the outstanding resources and attractions the route offers, there appears to be every opportunity to develop a tourism product which is economically viable, sustainable, and unique in the world.

